

Session #1 Outline

Use this template and the attached client handout so your first paid session with a client results in maximum client ENGAGEMENT and RESULTS. Sweet!

Tip: Keep your client session notes organized!

You'll want to keep track of what you talked about with your clients, what was important to them and noting the progress they make throughout your work together. Here are 3 ways to take notes during the session and stay organized:

1. Create a folder on your computer and label it with each client name.
2. Use the app called Evernote
3. Use written paper in file folders for each client

Overview of Session #1:

- Build Rapport
- What's Going Well
- Desired State Goal Setting
- Big MOFA (Motivating Factor)
- Anchoring The Big MOFA
- Clearing the Clutter
- Action Steps
- Aha's + Appreciations

1. Build Rapport

You'll begin your first paid session building rapport. You can do this with a 2-3 minute check in of how they are feeling. It sounds like this:

"Hi! Welcome. This is our first session together of your 90-day Total Transformation Program—how are you feeling about that?"

Dialogue briefly, but don't linger, keep the session moving forward. Tell the client that during this first session you'll be laying some foundational groundwork for a successful 90-day experience. Begin with "What's Going Well".

2. What's Going Well

Even though this is your first paid session, you want to establish the ritual of beginning your sessions by focusing on what's going well.

COACH: "I'd love to start our session with at is going well. And the reason that we start the session that way, is that most of us are so used to focusing on what's not going well, what we're doing wrong which has feel de-motivated. On the other hand when we focus on what IS going well, we feel motivated and inspired to keep making progress. So, I know that we haven't been working together yet, this is just our first

session, but I'm curious to start with something that is in your life or in your health, or in your body, that is going well. What is something that you are proud of trying or doing in the last 7 days no matter how tiny the effort is?"

[Client responds]

COACH: "Nicely done! We're going to be starting all of our sessions this way, focusing on what is going well as kind of a currency—a currency that motivates us to follow through even more, like a self-acknowledgement. And it doesn't matter how small the acknowledgement is. Acknowledgement is kind of a fuel, it motivates us, it gives us energy. This not about how evaluating how well we did something, or what we could have done better, it's not a test, all we're doing is recognizing ourselves for doing the best we can with what we have and then just whatever little effort we were able to do."

[Client responds. Acknowledge and congratulate them on what is going well. Notice the energy of the session goes up when you talk about what is going well!]

COACH: "Wow! Thank you. How exciting! See how good it can feel to acknowledge what is going well? This is a little ritual we'll be doing every time that we meet. Can you feel the surge of energy just talking about what is going well?"

[Client responds]

COACH: "It's so key because it's that extra energy that we feel in surplus that has us make better decisions about our health and our body. On the other hand when we're focused on what's not going well, we start to feel crappy and make crappy decisions. Does that make sense?"

[Client responds]

3. Desired State Goal Setting

What specific, measurable outcome do they want in 90-days and why? There are 5 criteria, which you may or may not want to explain to your client. For some this is too much intellectual information, for others it might fascinating. Experiment to discover your coaching style!

A well-formed outcome or goal is:

- Stated in the positive (says what we want, not what we don't want).
- Initiated and maintained by self (we don't need to rely on someone else changing).
- Achievable within the time frame given.
- Has a specific sensory based description – so we know how it feels or looks. It would be easy to measure or we have a description that would tell us when we have it.
- Appropriate chunk size – biggest chunk to be worthwhile yet small enough to feel attainable.

Here's how to lead your client through desired state goal setting in a coaching session:

COACH: "Great. So this session is going to be quite unique because it is our first session, so what I'd like to do now is set some goals. This is for the next 90 days, of what we're going to be focused on and working on together. Think of these as instructions to the universe, we want them to be specific and measurable, and achievable, and don't worry if you don't know what that means, I'm going to help you figure out what those are.

So let's just start with an open brainstorm? What are some outcomes, maybe two or three outcomes that you'd like to have happen over the next 90 days? Like if you got that, you'd feel like, "This was the best investment ever."

[Client responds]

Tip: We want a specific precise, achievable outcome here. If it's vague like, "I want to feel better" ask, "Better how?" or "How specifically would you like to be feeling?"

4. The Big Motivating Factor.

(Affectionately known as the The Big MOFA)

Once we know the desired state they want, we need to know WHY they want it. What you're going to do is repeat back to them in their words what they said they wanted. "So what you want is.... "

Then we'll ask, "What will having that do for you?" and repeat the question several times to understand what's REALLY driving your client's desire to change. Land on something that feels really important to them. What is the important thing that is driving them to change or make the changes now that they haven't been willing to make in the past?

Here's an example...

COACH: "So what you want is to exercise 3x/week."

CLIENT: [confirms or clarifies]

COACH: "What will having that do for you?" or "What's important about that?"

Repeat this last question a few times. Land on something that feels really important to them. What is the important thing that is driving them to change or make the changes now that they haven't been willing to make in the past?

You might even add, on a scale of 1-10 how important is this? Find something that is at least an 8, otherwise it's not a weighty enough driver. In that case, keep exploring until you find a valuable enough reason that they are making the commitment to follow through in ways they never have before.

5. Anchoring the WHY or The Big Motivating Factor

An “anchor” is something physical in their environment that will remind them WHY they are doing this. It could be the screen saver of their computer, their wedding ring as a vow to themselves, or notes around the house.

Have your client choose an anchor for each of the 5 senses. Examples are: A favorite song

- A delightful smell
- A pleasurable taste
- A happy touch
- Or the anchor can be on the client’s own body (i.e. a knuckle, the forearm or the solar plexus)

Here’s how to create anchors with your client:

COACH: “Now that have we identified your motivating factors (your big MOFA’s), we want to create little reminders so you don’t just forget about them between sessions. So I want to do something called “Anchoring your big MOFA.” An anchor is something physical in your environment that will remind you of WHY you’re doing all of this - why you’re making this effort, especially in the times where you don’t feel like it which over the next 90 days is bound to come up!

A lot of the progress is happening outside of our sessions between the calls, and unfortunately I won’t be there every moment when you’re making choices. These anchors will be like your accountability health coach in between our sessions. Little reminders to make conscious choices rather than defaulting to old behaviors.

So I want to create some anchors with you which will be things in your physical environment that will remind you of why you’re doing this. It could be a screensaver on your computer with an inspiring message, it could be a ring you wear, or notes around the house, one of your jewelry pieces, a song you sing—we can pair up the songs you sing with your Big Motivating Factors. So what will happen is when you see it or hear it, it will remind you of your Big Motivating Factors.

And it can do two things. It can be a pattern interrupt, like stop you like a record scratch when you’re tempted to make a choice which may not be in alignment with your outcomes here, or it can also just give you that influx of energy of like, “Oh ya! I want to do X for myself!” And give you that creative spark that you kind of had at the beginning of the session when you were talking about what’s going well. So it can help prevent us from making incongruent choices for ourselves, and it can also give us that little infusion of life like, ‘Oh Ya. I’m excited about making this good choice for myself in this moment!’

Does that make sense?”

[Client responds} Yes. That makes sense.

COACH: “Great. So what are some physical objects and sounds and smells in your environment that you see everyday that would make good anchors to remind you of your Big MoFA’s?”

6. Clear the Clutter Exercise

There often is some way we can make goals, but most people have made goals in the past and not achieved them, and part of it is because they haven't systematically or structurally changed anything in their life to make way for the new thing. We have to clear out the old furniture before we can bring in the new.

- Simply ask your client, "Is there any clutter in your schedule or environment that needs clearing before you can move forward?"

Give them 2-3 minutes to brainstorm a list of all the things which could possibly get in the way of them committing to themselves over the next 90 days.

Which of these are **within their control**? Have them put a star next to the things that are within their control and coach them to create conditions for success in this program. Which of these need clearing so that they have the conditions for success from the beginning?

7. Action Steps

Give one to 3 simple action steps. Here are 3 sample action steps from Stacey's health coaching practice:

1. **Clear the clutter and set the conditions for success.** Your client will focus on the current roadblocks that are in their control and take action towards clearing them out. Maybe this is something to do with setting sacred appointments with themselves or cleaning their closet. Make it relevant to your program and the ultimate result your client wants.
2. **Connect with your anchors.** Make it mean something! Write down your vow statement. Notice when you make choices that are not in alignment with this promise to yourself. No need to judge it, approach it compassionately and consciously. Every time you see, touch, hear your anchor it's a moment of truth: "Am I making the best choice for myself in this moment?"
3. **The AWARENESS Action - give ONE action around physical awareness.** We want the client to get connected to their body. This might be a breakfast experiment so they can start building the relationship between what they eat and how they feel. This might be finding the right movement for their body type - so perhaps they go to a yoga class, a pole dancing class and a jog, tuning into how they feel during and after each one.

Tip: Here are a few optional handouts to customize these action steps. For other 6Ws Master Checklist or the Client Handout Master Checklist...

- Clear Kitchen Clutter
- The 20-Minute Meal
- EBT Daily Check-In
- The Magic Plate
- Magic Snacks
- The Movement Menu
- (of course, you're welcome to choose any handout or exercise you feel is best; these are just some suggestions to get you started)

*Refer to your Client Handout Master Checklist for a quick visual of all client handouts at a glance.

8. Aha's, Appreciations, Insights About This Session

This helps them drop into the present, and it also seals in what they learned during your time together.

Then remind them that session #2 is next week. We'll start off by following up on these actions, and then we'll begin spiraling in a bit deeper.